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Does this scenario sound familiar? You started law school with a vision of what practicing law would be like. Maybe you were drawn to the idea of making a difference in the lives of those around you, maybe you sought the excitement and glamour of the courtroom, and of course you assumed you’d be making an above-average living while you were at it. You made it through those tough three years, passed the bar, and excitedly started your legal career.

But then, somewhere during those initial years of practice, amid the stacks of files, the long hours and the endless demands from less-than-appreciative clients, reality set in, and your dreams faded into the background.

If you’re like a lot of lawyers—maybe a majority of us—this sequence of events is all too familiar. We’ve all heard the statistics about career dissatisfaction among attorneys, and about the rates of substance abuse, depression, and divorce.

The question is, does this have to be the inevitable outcome of a life in the law?

We believe the answer to this question is an emphatic “NO!”

More than twenty years ago, a close friend and successful financial advisor introduced us to a new way of practicing law that transformed our practice—and our lives—forever. He did it by giving us a book by Michael E. Gerber called The E-Myth: Why Most Small Businesses Don’t Work and What to Do About It.

At that time, we—Robert Armstrong and Sanford M. Fisch—were already partners in a law firm, and after reading Michael’s book, the way we viewed our practice was completely and irrevocably altered. We began to see our law practice as a business… something bigger than ourselves that we could intentionally design, mold, and create.

What we have found is that the key to a thriving law office is a fundamental shift in your thinking. You have to stop thinking of your firm as merely a legal practice and start seeing it as a business. It may sound like a subtle change, but it’s actually profound. Once you make this shift, it will impact every single decision you make going forward.

Believe it or not, many of our colleagues are terribly hesitant to make this shift. After all, the practice of law is not a mere business, it’s an esteemed profession. To call it a business is to sacrifice the respect we’re due as attorneys, correct? Well, not exactly. The practice of law is unique among businesses precisely because it is a noble and honored profession. However, we do not practice law solely for the sake of practicing law. It is also a money-making enterprise, and, in order to run a profitable practice, you need legal skills and business smarts. The latter, unfortunately, is not taught in law school.

So, the first step in transforming your practice is to start viewing it as a business that has the potential to ultimately have a life apart from you. Once you clear this hurdle, you can do what we call working on your business instead of merely working in your business. What follows are five key, progressive steps that will help you achieve dramatic transformations in your law firm—and ultimately, your life.
Step 1: Find Your “Why”

Why do you do what you do? What were your reasons for entering the practice of law? Why did you choose your specific practice area? More importantly, does your chosen practice serve your needs? When faced with these questions, most attorneys—even those who own their practices—adopt a deer in the headlights stare. And, uncharacteristically, they’re suddenly at a loss for words.

Most of us have never given any thought to why we do what we do, or what purpose the practice of law should serve in our lives. Sure, practicing law is a way to make an income, but if that were your only reason for doing what you do, you wouldn’t work for yourself; you’d be content to be employed at someone else’s law firm.

The first step to transforming your practice is to set aside some time to honestly explore your practice, the purpose it serves in your life, and whether it fits with your original intentions for choosing the law as a career.

Ask yourself these questions: Why do you do what you do? How do you feel about your practice area? Did you choose it, or did it “choose” you? Are you passionate about the work you do, or do you drag yourself to the office most days fighting feelings of indifference…or even dread?

It is vitally important to take a cold, hard look at where you are as an attorney and as a business owner, so that you can take the next step and invent the life you want, one where you’re passionate about the work you do, and where you’re at the helm of a thriving business. Without passion, you won’t have the desire you’ll need to get up each morning and do the hard work necessary to build a flourishing business. Plus, if you’re not truly passionate about your work, you’re starting out a step behind your competitors who believe wholeheartedly in what they do.

What if you’re reading this and realizing that, like so many of our colleagues, you simply stumbled into your current practice area? What if you’re hard-pressed to imagine how you’ll ever develop a passion for work that you’ve found mind- or soul-numbing for the past five, ten, twenty or more years? Consider this—it’s never too late to change your practice area! It may seem daunting, and it may be a radical change, but this just might be the time to pursue it. Your future may depend on it.

Whether you’re happy in your current practice area or you determine, after whatever soul-searching you need to do, that it’s time for a change, here’s the key: at the end of this process, decide on a path and stick with it. Being decisive about your chosen path will impact all of your decisions going forward. It will give you the focus necessary to bring to life the future you envision. Without this focus, it’s all too easy to be sidetracked and weighed down by distractions.

Step 2: Envision Your Firm as You Want It to Be

Once you’ve figured out your “why,” it’s time to sit down and envision your law firm as you want it to be. It’s essential to remember that your business is not an end in itself; instead, it supports your “why.”

More accurately, your business is there to meet your needs, and the needs of your clients. When you rethink the way you’re practicing law and make a few fundamental changes, you’ll be able to offer your clients an experience they just can’t find anywhere else in your community.

The first step in envisioning your firm is to think about what standards you’ll implement and how you
want your clients to feel each and every time they leave your office. Most likely, you want them to feel special, listened to, taken care of, and as if their needs have been met. You want them to feel like no other attorney in your area could possibly take care of them the way you do.

With these standards in mind, project yourself into the future and envision, in detail, what your law firm will look like when it’s done.

- Picture your building—what do the outside grounds and entrance look like?

- What does the lobby look like? What furniture is there and how is it arranged? How about the art work on the walls? What reading materials are offered?

- Do you have marketing materials on display in the lobby? What do those materials look like? What image do you present to the community?

- Who’s your ideal client? What demographic group do they fit into?

- What are your firm’s business hours?

- When a client walks into your office, how is he or she greeted? What refreshments is he or she offered?

- In your back office, how does the work flow? Who does what? How are client files tracked? How are client phone calls and emails handled?

And on, and on…

What you’re doing with this exercise is building a detailed picture of the strategic objective for your firm. It’s a blueprint of what you want your firm to look like, and envisioning it down to the smallest detail is important. Like a blueprint, put it down on paper—you’ll be referring to it often. Otherwise, how will you know when you’ve reached your goal?

You can involve your spouse and your team members in this step as well. Not only will they have valuable insights to contribute, but it will also help to get all of you energized and excited about making your vision a reality.

**Step 3: Create Systems for a Unique, Thriving Firm**

You’ve envisioned your firm as you want it to be. Now, what actions do you need to take to bring your vision to life? The key is to establish the appropriate systems, and the first step to establishing these systems is to take a look at the roles of the people in your firm. For the moment, don’t think about the people themselves. Instead, focus on the roles each person fills and the activities performed on a daily basis by each and every person employed by you. Put this in writing because for every action that takes place in your firm on even a somewhat regular basis, you’ll be instituting a system.

You’ll also need to take a look back at the strategic objective that you just came up with. It represents a collection of goals for your firm. You need to write down each goal you want to accomplish and the steps required to reach each goal. Then, you’ll establish a system for tracking those steps and tracking performance.

In order to create the firm you’ve envisioned, you need to put in place a comprehensive group of systems that covers every function that occurs in your practice. At its core, a system says: this is what we do, and this is how we do it. Systems are not only key to ensuring that your firm runs efficiently and effectively, they are also an essential part of establishing a distinctive personality for your firm.

With great systems in place, everything that happens within the four walls of your firm happens in your
firm’s signature way. Without great systems, each employee is left to do things his or her own way. At best, this means that your firm lacks a coherent and cohesive identity. At worst, it means that chaos reigns.

For example, do your employees know:

➽ How the phone is answered?
➽ How clients are greeted?
➽ How documents are generated?
➽ How documents are filed?
➽ How new people are hired and trained?

If your vision is to be brought to life, your team of employees will need to know all these things and more. They’ll need to know not just how to perform the basic functions of a law firm, but how to do them “your way.” For each employee’s position, there will need to be an operations manual, written by that employee, explaining how his or her job is done.

To reiterate, systems are vital for two reasons:

1. They solidify your identity as a firm with your clients and in your community as a whole, creating a “personality” for your firm.
2. They make the success of your business less dependent on the personalities of your employees.

Step 4: Master Your Time

Are you in control of your time, or does it control you? Most lawyers, while extremely busy, are not great at time management. Their days are not spent performing the functions that represent the highest and best uses of their time. Instead, the working day of an average attorney is spent either performing mundane tasks that could be taken care of by an employee or rushing around to put out the latest fire. Whether that fire is finding a missing but vital file, dealing with a personnel problem, or attempting to appease a disgruntled client, it means that their time is controlling them instead of the other way around.

The problem with this is that when you let outside circumstances control you, you never get a chance to step back to work on your business, instead of merely working in it, and build the firm—and the life—you’re meant to have.

Time Blocking

One way to see an immediate transformation in how you manage your time is to use a technique called “time blocking.” This technique can—and should—be used in every area of your life, but here’s how it applies to your business.

Set aside a block of time each day to work on your business, engaging in the work of an owner, and not simply doing the work of an attorney. What does this mean as a practical matter? It will vary from day to day, and from practice to practice, but here are some examples of how this block of time can be spent:

➽ Learning a new skill to help you grow your business
➽ Going over the results of a recent marketing effort
➽ Developing a marketing plan
➽ Training team members

How should it not be spent?

➽ Checking your email
➽ Surfing the internet
➽ Proofing, editing or working on that essential brief/contract/document

This block of time is an appointment that you make with yourself each day, and it should be accorded the
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respect you’d give to any of your other appointments. Make it a habit and you’ll be amazed at the rewards you’ll reap as a business owner.

Now, what about the rest of your day?

Time Log
In order to make a change in how you manage your time, it’s necessary to have objective information on how you actually spend your time at present. The best way to do this is to keep a detailed, accurate time log.

Find a stop watch and for one week, write down each activity in which you become involved—whether it’s at work or during your personal time. Include the exact start time and stop time for each activity. At the end of the week, you’ll take a look at the information you’ve collected and sort each activity into categories. To get you started, some categories might include:

➽ Email
➽ Research
➽ Client Meetings
➽ Document Preparation
➽ Administrative Tasks
➽ Web Surfing
➽ Phone Calls
➽ Mealtime
➽ Family Time

Once you’ve assigned each activity to a category, calculate what percentage of your time you spend on each category of activity. This can be a real eye-opener as to how you’re really spending your time.

Now that you know how you’ve been spending your time you can begin to take control of your schedule in order to make the best use of the limited time you have each day. How should you be allocating your precious working hours? Here are our suggestions:

1. Determine the highest and best use of your time. What are your strengths? What is that skill or set of skills that you’re better at than most? These are the activities during your working day that you enjoy, that energize you, and that you want to keep getting better at.

2. Determine the things that absolutely have to be done by you. This means, if you’re the only licensed attorney at your firm, what functions legally and ethically must be performed by you, the attorney? This may be a smaller list than you had assumed.

3. Once you’ve determined those activities that absolutely must be done by you, and those activities that represent the highest and best use of your time, focus on these things—and delegate the rest.

4. Make a plan to keep your interruptions to a minimum. Communicate this plan to your employees and stick to it. For example, establish a set time to meet with team members and address questions and problems. Check your email at a few pre-determined points during the day, instead of every few minutes.

5. Tackle the two or three most important tasks on your to-do lists first thing each morning.
Step 5: Practice the Art of Effective Delegation

How many times have you tried to delegate even the simplest of tasks, and those tasks either didn’t get done or weren’t done properly? Most of us are hesitant to delegate because it’s often simpler to just do the work ourselves. Yet doing it all ourselves cripples our ability to effectively manage our time.

The problem? Most business owners, lawyers and non-lawyers alike, have a fundamental misunderstanding of what proper delegation is all about. Most people assume that “delegation” means handing off a task to someone who (we assume) should be capable of doing it, and hoping it gets done, and done “right.” Of course, the results aren’t always satisfactory.

That’s because the scenario above doesn’t qualify as effective delegation. Here are the steps for delegating a task, and getting the results you want:

1. Define precisely what task you want to delegate.
2. Make sure your employee understands what you’ve delegated.
3. Explain why it needs to be done the way you want it done.
4. Spend time teaching how it is to be done.
5. Make sure your employee understands what you are expecting.
6. Set a deadline for the task to be completed or for a progress report, and confirm their agreement with those deadlines.
7. Follow up and check on the employee’s progress.

Your first thought is likely that effective delegation is a time-consuming and labor-intensive process, so how does this help you free up your time? Granted, delegating a task the right way may require a significant up-front investment of your time. However, when you delegate work to an employee who knows precisely what’s expected and how to do it, you end up with work that actually gets done the right way by someone other than you! Once you have well-trained employees and established systems, this happens over and over again. The long-term payoff is that you reap the rewards of effective delegation in the form of more time to spend working on your business, and not just in your business.

You Don’t Have to Do It Alone

If you’re truly ready to transform your practice, now is the time for you to move toward your dreams. In fact, we encourage not only movement toward your dreams, but massive action on your part.

Your immediate first step should be to set aside time for a personal retreat during which you examine where your business is now, what it is you want from your business, and how your business is going to serve your personal needs, as well as the needs of your clients. Figure out your “big picture,” as it were.

Next, you need to develop a roadmap for how you’re going to get from where you are now to where you want to be. This is where you envision what your future firm will look like, down to the last detail. Don’t worry about how long this takes you—it could take several weeks of setting aside large blocks of time. Just keep at it until you’ve gotten it right.

Once you’ve crafted your vision, it’s time to implement the systems necessary to make it a reality and to master your time so that you can truly work on your business instead of merely working in it.
Sound overwhelming? If you had to do it all on your own, it would be; you’d be in for the trial-and-error, guesswork, and stress that accompany a lone attorney attempting to reinvent a law practice.

The good news? We figured out how to do it more than twenty years ago. Since then, through the American Academy of Estate Planning Attorneys, we’ve helped thousands of attorneys and associates from all walks of life transform their practices into thriving businesses, and more than that, into profoundly important enterprises.

The American Academy of Estate Planning Attorneys

Academy Members belong to a nationwide community of attorneys who receive an entire range of support and benefits. For example, new Members receive assistance in assessing their current practice and envisioning their ideal firm, down to the last detail. They’re given tools to assess their talents and identify their strengths.

Members are given access to, and assistance in, implementing the Academy’s practice management program known as the “11 Essential Systems to Dominate Your Market,” which includes:

1. Strategic Planning System: Aligning your business with your personal values and goals
2. Finance and Operations Management System: Managing by the numbers and seamlessly making it all work
3. A Systems Approach to Leadership: Creating a firm culture, focusing on unique abilities and the road to mastery
4. Staff Accountability and Team Building System: Putting the right people with the right skills in the right positions
5. Comprehensive Technology System: Leveraging online and offline tools to draft documents and manage your firm
6. Integrated Marketing and Public Relations System: Multiple marketing activities generating an endless supply of qualified prospects
7. No Stress Client Engagement System: Predictably inspiring consumers to take action and retain your firm
8. Efficient Workflow Systems: Drafting, reviewing and executing state-of-the-art estate plans
9. Continuing Legal Education System: Staying on the cutting edge of effective legal strategies
10. Ancillary Business Systems: Leveraging client relationships to generate multiple sources of revenue
11. Ongoing Mastermind System: Structures to participate in a community of like-minded attorneys

Each Member also works one-on-one with a Practice Building Consultant to implement these systems and to set short- and long-term goals and remain accountable for achieving them. Members have access to cutting-edge technology, a responsive legal education department that’s staffed with top legal minds, and a nationwide network of colleagues, many of whom are at the forefront of their field.

This is just the beginning. The Academy is committed to giving its Members the continuous support they need to offer unparalleled services to their clients.
Our track record speaks for itself: 33% of our Membership have been Members for fifteen years or more, 56% for ten or more years, and 76% for five or more years.

To find out what Members have to say about Academy Membership, visit:


If you’re ready to learn more about Academy Membership, please email info@aaepa.com or call 800-846-1555.

So what’s next?
We hope this report inspires you to take the time to review the elements of your practice that are working, the areas of your practice that could work better.

Every system outlined in this report, as well as our book The E-Myth Attorney is available with Academy membership. If you feel that you would like to explore these systems with us, we offer free consultations with attorneys to help them decide if our tools and systems are right for your firm and if your firm is right for Membership. Roughly 15% of the law firms inquiring are not in the position to take full advantage of membership and we’re happy to help you find out if we have something that can make a difference in your firm!

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